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Wealthtech Weekly

April 24, 2025

By Rob Burgess
Reporter

Hired in March, Triad Wealth Partners' chief technology officer Quin Kilgore has an ambitious goal: Take the firm's AUM from $460 million to $1 billion before 2026. For the latest "Show Me Your Stack," he told me the firm plans to accomplish this, in part, by building an AI-powered engine on top of its coaching and training content.

Have you built a tech stack from scratch? Let me know — robert.burgess@arizent.com.

I hope you'll check out the article, along with the rest of this week's stories.

As always, thank you for reading. Talk to you next Thursday!

Connect with Rob:

WEB SEMINAR

Hosted by Financial Planning

Outlook Update: Repositioning portfolios in real time

April 30, 2025 | 2 p.m. ET/11 a.m. PT

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TOP STORIES

SHOW ME YOUR STACK

Growing a tech stack to reach $1B in AUM: Show Me Your Stack

A month into his new job, Triad Wealth Partners' chief technology officer Quin Kilgore is looking to build proprietary platforms and leverage AI tools to more than double the firm's AUM.

- **Why Dani Fava is a 'techno-optimist' on AI in wealth management**
  The Carson Group's chief strategy officer talked about moving AI from the back to the front office, keeping the humans in the loop, solving cybersecurity concerns and where she thinks AI is headed in the industry.

- **Nobody wins when family fights: How advisors reduce conflict**
  Lack of communication about estate plans and the reasons behind them is sure to cause static among client families down the line.
- **How to build lasting client relationships in wealth management**
  From podcasts to technology, advisors are turning to modern offerings for help building new relationships with clients and strengthening existing ones.
- **Trump, taxes and markets: Key insights for investors**
  President-elect Donald Trump is bringing numerous changes to wealth management with his return to the White House, from the Tax Cuts and Jobs Act to Social Security.

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